

**FORM FOR SCORING OF TRAINING RESOURCE TO FULFILL FEDERAL BUILDING PERSONNEL TRAINING ACT (FBPTA) CORE COMPETENCIES**

The FBPTA requires Federal building personnel to demonstrate compliance with a set of Core Competencies. The General Services Administration (GSA) accepts submissions for courses, certificates, certifications, accreditations, registrations, licenses, and other qualifications that demonstrate alignment with the FBPTA Core Competencies. GSA will post resources that sufficiently map to FBPTA Core Competency requirements on the FMI webpage (www.fmi.gov) and may incorporate them into the Core Competency Web Tool. The Web Tool allows Federal buildings personnel to immediately claim credit for competencies met by completing approved training. FMI and the Core Competency Web Tool help Federal employees identify appropriate training, and allow Federal agencies to share information on training sources. To qualify for consideration, submitters complete this form describing how a specific training resource, certification / accreditation, license or other resource aligns with FBPTA core competencies through AskFMI@gsa.gov.

Initial Review Conducted By: Maria Fara

Initial Review Submission Completion Date: August 30, 2013

Technical Review Conducted By: Doug Yon

Technical Review Submission Completion Date: January 10, 2014

Alignment of Competency with Functional Roles

- Often Aligned with Facility Management roles (24/43 Core Competencies)
- Often Aligned with Building Operations Professional roles (6/43 Core Competencies)
- Often Aligned with Energy Management Role (7/43 Core Competencies)
- Often Aligned with more than one role (6/43 Core Competencies)

**1. Please complete the following for each training course submitted for consideration:**

Training provider: BOMI International

Provider address information (primary physical location, including address, city, state, zip code): One Park Place Suite 475, Annapolis, MD 21401

Provider's primary point of contact for this learning resource (name, primary physical location (if different from provider address information), phone, and email): Ron Bishop, (410) 974-1410 x1259, rbishop@bomi.org

Title of this training resource: Facilities Planning Project Management

Type of training course: Facilities Management

Does this course provide CEUs (Continuing Education Units) and if so, how many and for what occupation or field? Yes, 2 ACE semester hours.

Learning objective(s) associated with this training course: Execute post-occupancy evaluations using facilities annual reports, Organize and plan a successful facilities project, Assemble a project team, including consultants, Use guidelines to determine user needs, Understand the role each employee and/or contractor has in managing a facility.

Delivery method and learning methods (delivery methods may include online instruction, classroom instruction, or other means, and learning methods could include lecture, group work, essay work, quizzes, or other learning activities): Instructor Led Online, Self-Study, Live Classroom/Accelerated Review. Learning Methods, lecture, group work, quizzes, practice exam, 3rd Party proctored final exam.

Length of training (in hours): 30 Hours

URL link to information about the training course, content, and/or syllabus: <http://www.bomi.org/Courses/Facilities-Planning-and-Project-Management/>

**2. Review the course objective(s) that have been submitted as being aligned with required FBPTA performance criteria. Review the learning methods in the course that will support that learning objective(s).**

FBPTA Core Competency Area	Required FBPTA performance criteria	Based on technical review of learning objectives and skills, does this resource map to the performance criteria?	Initial Review: Are all submission requirements included?	Initial Review: Are descriptions clear and logical?	Initial Review: Are all materials referenced included with the submission?	Technical Review: Learning Objectives Reviewed	Technical Review: Skills Reviewed	Technical Review: Are there any clarifications requested?	If clarification requested, note here	Clarification Response From Provider	Technical Review: Identify other materials submitted	Technical Review: Other Materials Reviewed
Facilities O&M Building Systems	1.1.2.Demonstrate ability to work with Facilities Team to assess a facility's need for building systems.	No, based on the review of the learning objectives and the skills/materials covered, this course does not address the ability to work with Facilities Team to assess a facility's need for building systems.	Yes	Yes	Yes	Yes	Yes	Yes	The learning objectives, skills, and material focus on the facility manager and do not appear to address working with the Facilities Team to assess facility needs for building systems. The course appears to address working with the Facilities team. Request clarification on how the course address assessing a facility's need for building systems.			

1. Management	1.1 Management	1.1.4. Demonstrate ability to work with Facilities Team to establish practices and procedures.	Yes, based on a review of the learning objectives and skills/material covered, the course should address the ability to work with Facilities Team to establish practices and procedures.	Yes	Yes	Yes	Yes	Yes	No				
5. Safety	5.4. Occupant Interface	5.4.1. Demonstrate ability to ensure tenant renovations have adequate design, does not interfere with other tenants, local code compliance, high quality of work.	Partial. Based on the review of the learning objectives and the skills/materials covered, this course appears to address interfere with other tenants only. The course does not appear to cover occupant interface with regard to safety as it pertains to ensuring tenant renovations have adequate design, local code compliance, and high quality of work. The course focuses on matters of project management communication techniques and general project coordination with the only tenant reference limited to maintaining normal operations.	Yes	Yes	Yes	Yes	Yes	Yes		Upon reevaluation, we would also like to include this performance criteria. Content relevant includes: LO 12.4. Describe how management and communication techniques are applied to achieve effective project control and handle site visits, progress meetings, progress payments, change orders, and disputes and claims. LO 12.5. Describe the primary coordination issues associated with project work performed by other corporate departments, furniture and equipment vendors, and project stakeholders. Content includes knowledge on coordinating project work with other projects, accessibility issues during construction, and maintaining normal operations for other tenants.		
9. Project Management	9.1. Initiate	9.1.1. Demonstrate ability to work in integrated project teams to execute, small, medium, and large projects. <a href="http://www.wbdg.org/project/deliveryteams.php">http://www.wbdg.org/project/deliveryteams.php</a>	Yes, based on a review of the learning objectives and skills/material covered, the course should address the ability to work in integrated project teams to execute, small, medium, and large projects	Yes	Yes	Yes	Yes	Yes	No				
		9.1.2. Demonstrate knowledge and ability to follow Project Management processes and procedures per your organization's preferred methodology. <a href="http://www.wbdg.org/project/pm.php#mr">http://www.wbdg.org/project/pm.php#mr</a>	Yes, based on a review of the learning objectives and skills/material covered, the course should address the ability initiate project management processes and procedures.	Yes	Yes	Yes	Yes	Yes	No				
	9.2. Execute	9.2.1. Demonstrate ability to manage and coordinate project execution. <a href="http://www.wbdg.org/project/pm.php">http://www.wbdg.org/project/pm.php</a>	Partial. This course received partial credit because the course provides for the general ability to manage and coordinate aspects of project execution. However, as the performance criteria makes specific reference to WBDG project management execution, the course does not sufficiently provide information similar to what is covered in the WBDG specifics regarding Project Management Planning (PMP).	Yes	Yes	Yes	Yes	Yes	Yes	The skill/material and learning objective provided do not clearly address all of the requirements of the performance criteria. Specifically make reference to "Whole Building Design Guide" requirements for "Project Planning, Delivery and Controls" regarding a Project Management Plan (PMP). Request clarification on how inspections, project meetings, project progress reports, and monitoring of costs and schedules are covered in the course.	LO 12.4. Describe how management and communication techniques are applied to achieve effective project control and handle site visits, progress meetings, progress payments, change orders, and disputes and claims. The course does not specifically reference the WBDG.		
		9.2.2. Demonstrate ability to manage and coordinate contractor performance.	Partial. This course received credit because the course provides specific knowledge and ability about: o Produce project change orders o Attend site reviews o If Contracting Officer Representative - approve project payments/draws o Resolve project issues o Secure project warranties o Develop spare parts lists  The course does not cover: o Obtain maintenance contracts o Arrange staff training for new equipment	Yes	Yes	Yes	Yes	Yes	Yes	From the skill/material and learning objective provided it is not clear if all of the requirements of the performance criteria are covered within the course. Request clarification on how arranging for training and obtaining maintenance contracts are included in the course.			
		9.3. Close-out	9.3.1. Demonstrate ability to manage and coordinate contractor performance.	Partial. This course received credit because the course provides specific knowledge and ability about project close out contract documents, including punch list, as-built drawings, certificate of beneficial occupancy, operating system documentation including commissioning documents, release of liens, equipment warranties, guarantees, and operating manuals, line item actual versus budgeted costs, and payments versus holds on final payments. However, it does cover project commissioning, budget variance reports, or review of lessons learned	Yes	Yes	Yes	Yes	Yes	Yes	From the skill/material and learning objective provided it is not clear if all of the requirements of the performance criteria are covered within the course. Request clarification as to how project commissioning, budget variance reports, and review of lessons learned are covered.		

10. Business, Budget and Contracting	10.3. Contracting	10.3.2. Demonstrate knowledge of rules and requirements for purchasing products and services.	No, based on the review of the learning objectives and the skills/materials covered, this course does not address the knowledge of purchasing rules and requirements. The course focuses on communications and pricing agreements and does not map to demonstrating the knowledge of rules and requirements for contracting performance criteria.	Yes	Yes	Yes	Yes	Yes	No				
	10.4. Budget Formulation and	10.4.1. Demonstrate ability to develop and manage a project/program budget.	No, based on the review of the learning objectives and the skills/materials covered, this course does not cover the ability to develop and/or manage a project/program budget. The course does not to clearly map to the performance criteria.	Yes	Yes	Yes	Yes	Yes	Yes	It is not clear that integrating budgeting references into project planning and viability assures a demonstrated capability to develop and/or manage a budget. Request clarification and course content specifically relevant to the ability to develop and manage a budget for a project or program.			
11. Leadership and Innovation	11.2. Personnel	11.2.1. Demonstrate knowledge and ability to ensure corporate, life safety, and regulatory compliance.	Partial. This course received partial credit because the whole of the course materials provides general knowledge of the need to ensure corporate, life safety, and regulatory compliance in the context of a strategic facilities plan. The course does not cover the knowledge or ability to Monitor changes in laws and regulations, Assure the facility and its operation complies with laws and regulations, or Conduct due diligence studies.	Yes	Yes	Yes	Yes	Yes	Yes	It is not clear that the various planning activities, and specifically understanding a strategic facilities plan addresses the specifics of the performance criteria. The course is limited to a general overview of facility management. Please show how the course provides the knowledge and ability to: - Monitor changes in laws and regulations - Assure the facility and its operation complies with laws and regulations - Conduct due diligence studies Request clarification and course content relevant to these specific performance criteria.	Monitoring changes in regulations and assuring compliance are addressed throughout the course as a responsibility of facilities management. It is also included in a case study that runs through the course. Due diligence of both facilities management as part of contracting is addressed.		
	11.3. Innovation	11.3.2. Demonstrate knowledge and ability to assess risks and opportunities.	No, based on the review of the learning objectives and the skills/materials covered, this course does not knowledge and ability to assess risks and opportunities.	Yes	Yes	Yes	Yes	Yes	Yes				
12. Performance Measures	12.3. Establishment	12.3.1. Demonstrate knowledge of Performance Measurement concepts (ex. SMART – Specific, Measureable, Actionable, Time-bound) REVIEW - <a href="http://www.wbdg.org/resources/measperfsubstbldgs.php">http://www.wbdg.org/resources/measperfsubstbldgs.php</a>	Yes, based on a review of the learning objectives and skills/material covered, the topics listed should include the knowledge of Performance Measurement concepts.	Yes	Yes	Yes	Yes	Yes	No				